

SAGELINE 50

Video Training Content

1) Setup

- 1.1 Setup after installation
- 1.2 Creating a password
- 1.3 Changing a password
- 1.4 General Navigation
- 1.5 Enlarging buttons
- 1.6 About tabs
- 1.7 Resizing the screen
- 1.8 The process view
- 1.9 The list view
- 1.10 Changing Module Default Views

2) Customer

- 2.1 Creating a customer record
- 2.2 Editing a customer record
- 2.3 Deleting a customer record
- 2.4 Changing a customer's credit limit
- 2.5 Changing a customer's default nominal code
- 2.6 Changing a customer's default tax code
- 2.7 Producing a sales invoice
- 2.8 Producing a product sales invoice
- 2.9 Duplicating a sales invoice
- 2.10 Editing a sales invoice
- 2.11 Printing a sales invoice
- 2.12 Updating a sales invoice to ledger
- 2.13 Posting a batch sales invoice
- 2.14 Posting a batch sales credit note
- 2.15 Posting a customer receipt
- 2.16 Producing a customer statement
- 2.17 Running an aged debtors report

3) Supplier

- 3.1 Creating a supplier record
- 3.2 Editing a supplier record
- 3.3 Deleting a supplier record
- 3.4 Changing a suppliers credit limit
- 3.5 Changing a suppliers default nominal code
- 3.6 Changing a supplier default tax code
- 3.7 Posting a purchase invoice
- 3.8 Posting a purchase credit note
- 3.9 Posting a supplier payment
- 3.10 Running an aged creditors report
- 3.11 Restricting mail to suppliers
- 3.12 Putting a supplier on hold
- 3.13 The supplier dashboard

4) Nominal ledger

- 4.1 Creating a nominal record
- 4.2 Editing a nominal record
- 4.3 Deleting a nominal record
- 4.4 Posting a nominal ledger journal
- 4.5 Ledger Activity
- 4.6 Preparing a VAT return
- 4.7 Running a trail balance report
- 4.8 Running a profit and loss report
- 4.9 Running a balance sheet report

5) Product

- 5.1 Creating a product record
- 5.2 Editing a product record
- 5.3 Deleting a product record
- 5.4 Setting up product categories

6) Bank

- 6.1 Creating a bank record
- 6.2 Editing a bank record
- 6.3 Deleting a bank record
- 6.4 Posting a bank receipt
- 6.5 Posting a bank payment
- 6.6 Bank transfers
- 6.7 Recurring bank payments

7) Misc & Year end

- 7.1 Using the find function in financials
- 7.2 Creating a backup
- 7.3 Restoring a backup
- 7.4 Year end function
- 7.5 Producing remittance slips
- 7.6 The company dashboard

8) Terms

- 8.1 Assets
- 8.2 Audit
- 8.3 Balance Sheet
- 8.4 Budget
- 8.5 Credit / Debit
- 8.6 Credit Limit
- 8.7 Creditor / Debtor
- 8.8 Depreciation
- 8.9 Gross Profit
- 8.10 Journal
- 8.11 Liabilities
- 8.12 Nominal Ledger / Nominal Code
- 8.13 Overheads
- 8.14 Posting
- 8.15 Profit and Loss